

# Shangri-La Transitions

## Funeral Planning Checklist

### DOCUMENTATION

**TASK:** \_\_\_\_\_ **DATE/INITIALS:** \_\_\_\_\_

#### Notifications:

- Call friends and family \_\_\_\_\_
  - Make contact list
- Send Obituary to paper \_\_\_\_\_
  - Gather personal info, funeral & burial info
  - Organize and write
  - Second opinion / edit
  - Choose photo
- Order death certificate \_\_\_\_\_
- Obtain burial permit \_\_\_\_\_

#### Data Collection:

- Full name: \_\_\_\_\_
- Hometown: \_\_\_\_\_
- Birthdate & date of death: \_\_\_\_\_
- Education background: \_\_\_\_\_  
\_\_\_\_\_
- Work history: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Names of family members: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- Locate preferences/will: \_\_\_\_\_

#### Guest Materials:

- Memorial prayer cards \_\_\_\_\_
  - Select format
  - Select photo
  - Select saying/prayer
  - Order cards
- Funeral programs \_\_\_\_\_
  - Select format
  - Select photo
  - Choose order of events
  - Print/order programs
- Select guest book \_\_\_\_\_

### BURIAL DETAILS

**TASK:** \_\_\_\_\_ **DATE/INITIALS:** \_\_\_\_\_

#### Type:

- Decide on type \_\_\_\_\_  
Type of burial: \_\_\_\_\_  
\_\_\_\_\_

#### Vessels:

- Choose/order casket or cremation vessel: \_\_\_\_\_

#### Body Preparation:

- Select preparer \_\_\_\_\_  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Contact Info: \_\_\_\_\_  
Preparation date: \_\_\_\_\_

- Arrange body transport \_\_\_\_\_
- Choose clothing/accessories \_\_\_\_\_

#### Location:

- Confirm site \_\_\_\_\_  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Contact Info: \_\_\_\_\_
- Set date/time \_\_\_\_\_  
Date/Time: \_\_\_\_\_
- Arrange family transportation to and from \_\_\_\_\_

#### After Funeral/Burial:

- Decide whether to have meal \_\_\_\_\_
- Confirm meal location: \_\_\_\_\_  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Contact Info: \_\_\_\_\_
- Choose meal provider \_\_\_\_\_  
Name: \_\_\_\_\_  
Contact Info: \_\_\_\_\_
- Decide where flower arrangements go \_\_\_\_\_  
Location: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Notes:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Shangri-La Transitions

## Funeral Details Checklist

**TASK:** \_\_\_\_\_ **DATE/INITIALS:** \_\_\_\_\_

### Viewing/Wake:

- Decide to have or not \_\_\_\_\_
- Confirm location \_\_\_\_\_  
Location Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Contact Info: \_\_\_\_\_
- Confirm time frames \_\_\_\_\_  
Date: \_\_\_\_\_  
Time: \_\_\_\_\_
- Choose body presentation \_\_\_\_\_
- Gather photos \_\_\_\_\_
  - Create display \_\_\_\_\_
- Choose music \_\_\_\_\_

### Funeral Location:

- Decide to have or not \_\_\_\_\_
- Confirm location \_\_\_\_\_  
Location Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Contact Info: \_\_\_\_\_
- Confirm time frames \_\_\_\_\_  
Date/Time: \_\_\_\_\_
- Choose body presentation \_\_\_\_\_
- Create photo display \_\_\_\_\_
- Notify friends and family \_\_\_\_\_
  - Include in obituary \_\_\_\_\_

**TASK:** \_\_\_\_\_ **DATE/INITIALS:** \_\_\_\_\_

### Program Participants:

- Choose funeral officiator \_\_\_\_\_  
Presider Name: \_\_\_\_\_  
Contact Info: \_\_\_\_\_
- Select readings \_\_\_\_\_
- Ask people to read \_\_\_\_\_  
Prayer reader: \_\_\_\_\_  
Eulogy reader: \_\_\_\_\_  
Other readers: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Select/notify pallbearers \_\_\_\_\_

### Flowers and Music:

- Order floral arrangements \_\_\_\_\_
- Choose music: \_\_\_\_\_

**Notes:** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_